



Supply Chain Update to the Joint Assembly Committee on Agriculture and Select Committee on Ports and Goods Movement

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Trade Disruptions Continue

2018-2019 U.S.-China Trade Tensions

Tariffs & Retaliatory Tariffs

Manufacturer Migration to Southeast Asia
= Cargo Routing to U.S. East Coast

Cargo Owners Pull Inventories Forward in
Advance of Scheduled Tariff Increases

Tariff Wars Exacerbate
Trade Deficit Imbalances

Record-Setting 2018 Volume

2020-2021 COVID-19 Disruptions

Distressed Supply Chain

Economies Shutter
China Manufacturing Halts

Global and Regional Workforce Shortages

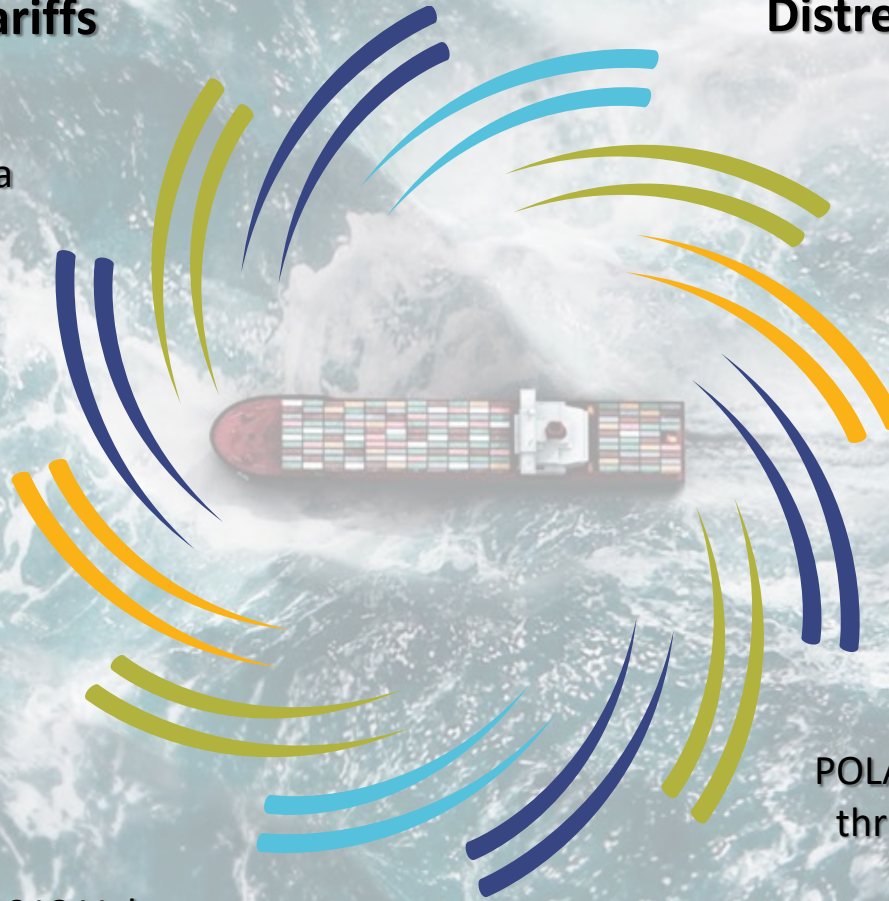
Consumer-Driven Cargo Surge
E-Commerce Boom

Global Supply Chain Disruptions

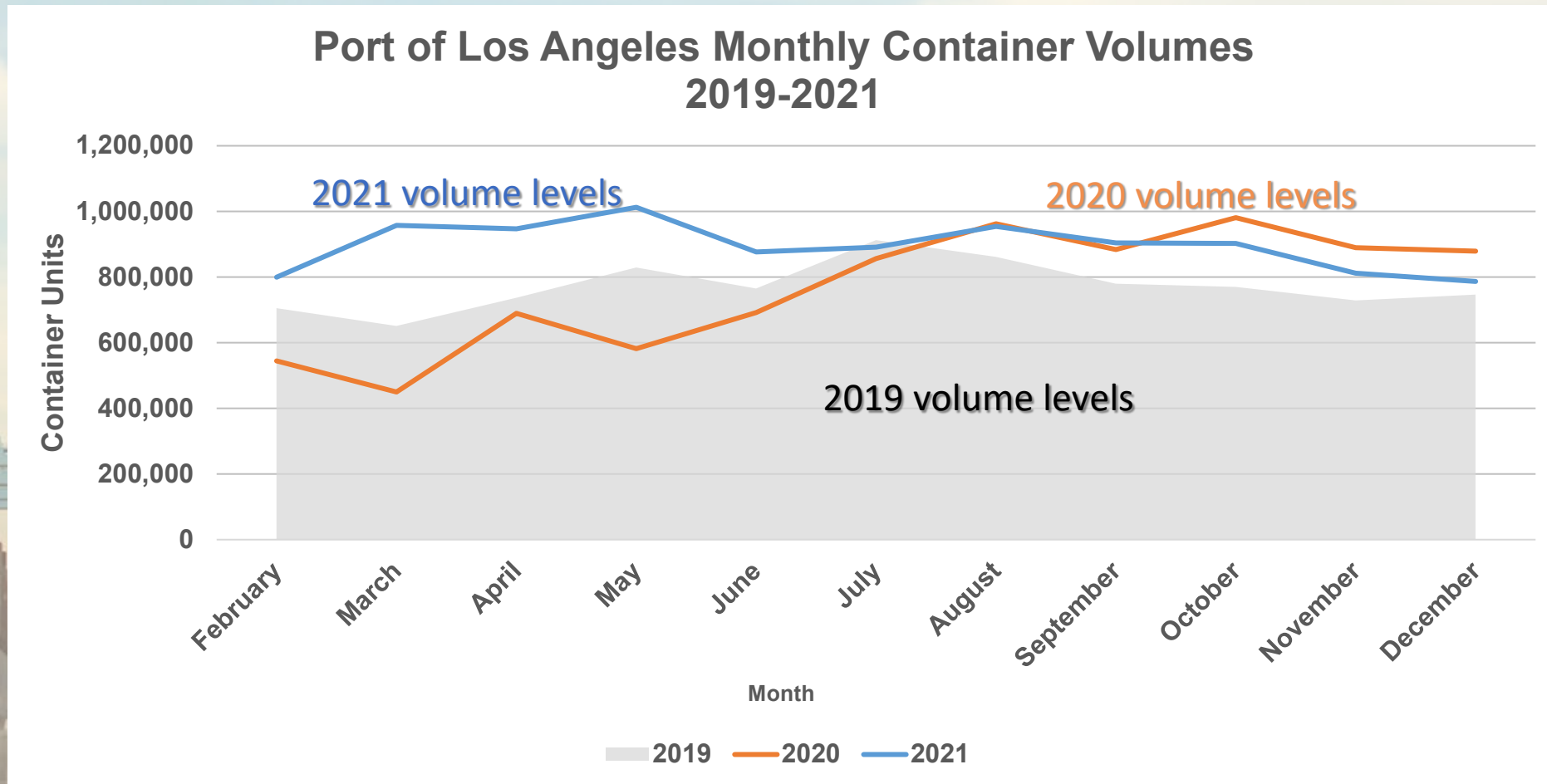
Container Shortages
Shipping Price Hikes

POLA Exports Down 34 out of 38 months
thru Dec. (biggest declines since 2002)

Record-Setting 2021 Volume

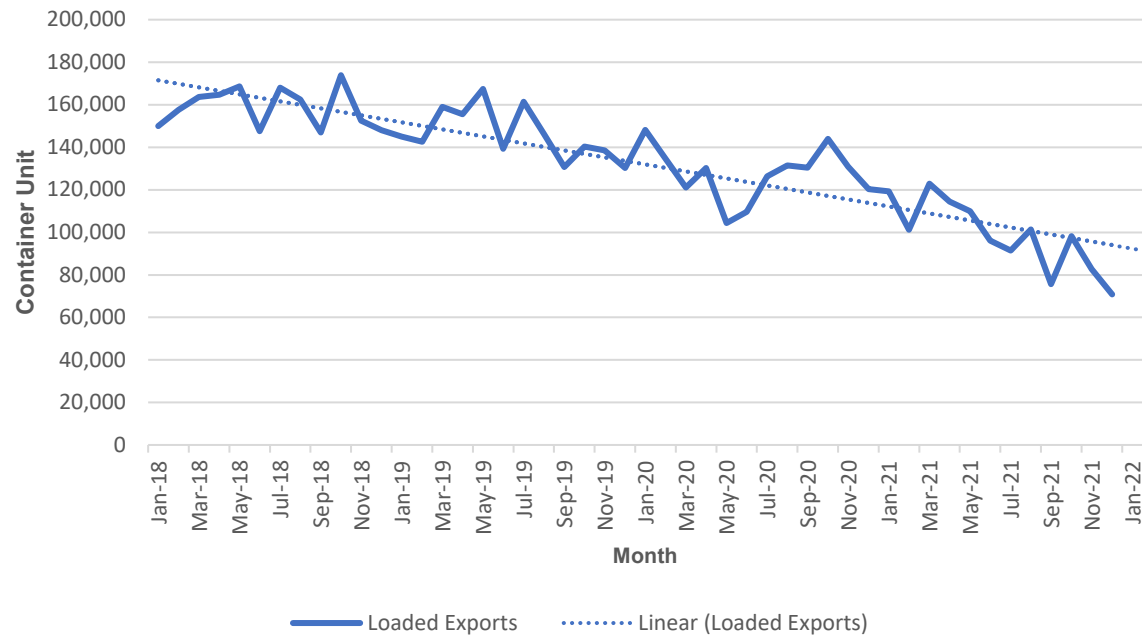


Volume Surge Beginning Mid-2020

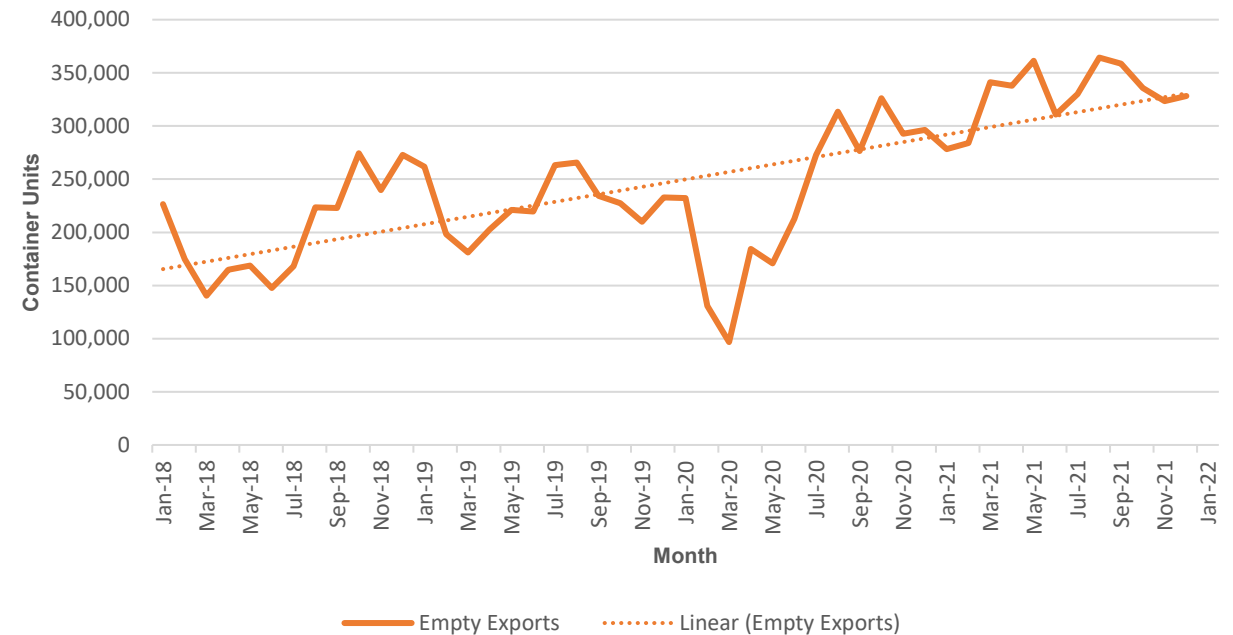


Loaded Exports vs. Empty Exports

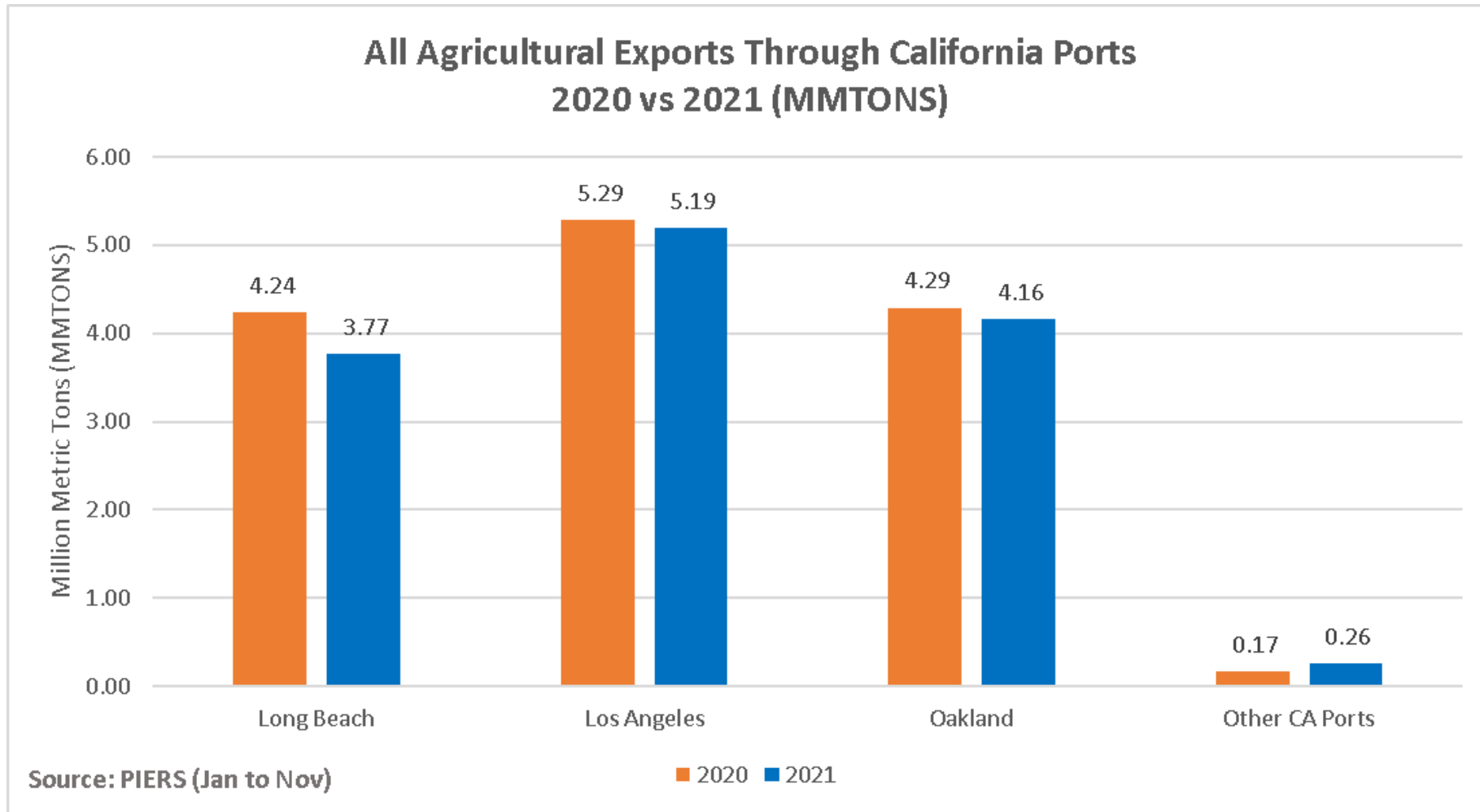
Loaded Exports
January 2018 - December 2021



Empty Exports
January 2018 - December 2021



Agricultural Exports through CA Ports

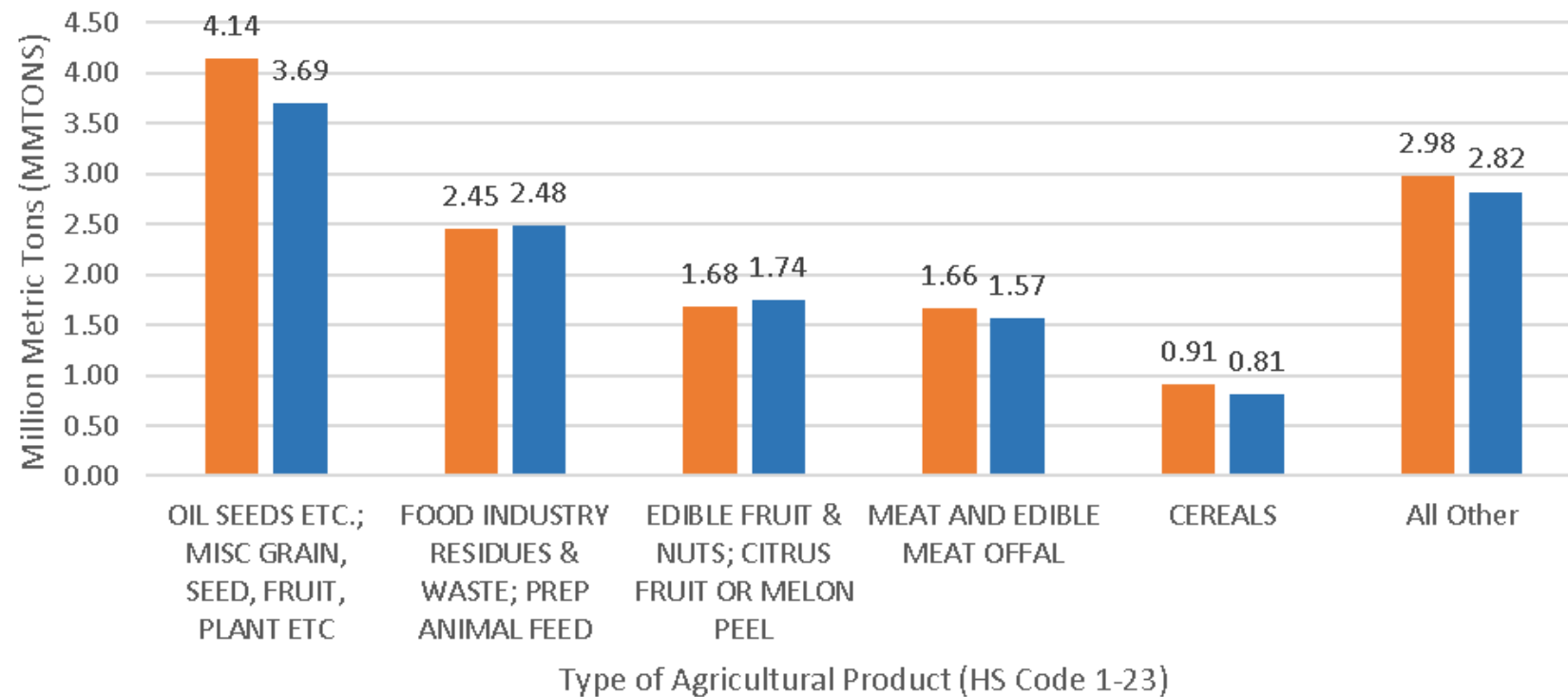


Source: PIERs (Jan to Nov)

2020 2021

Top Five Exports, 2020 vs. 2021

Top 5 Agricultural Exports through LA, Oakland and Long Beach
2020 vs 2021 (MMTONS)



Source: PIERs (Jan to Nov)

2020 2021

Source: PIERs (Jan to Nov)

2020 2021

Short-Term Focus

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- Implement truck turn time, dual transaction and liner incentives to improve cargo flow
 - Expand use of info-sharing to improve supply chain visibility
 - Work with FMC on truck gate management, D&D/ERD pilot
 - Continue work on freight data architecture & standards
 - Better use of existing capacity

Longer-Term Recommendations

- Continue convening comprehensive stakeholder dialogue including relevant federal and state agencies
- Improve supply chain digitalization – We are 30 years behind other nations
- Develop national & state export policy – Get American farmers and manufacturers back in the game. Identify best practices from targeted sector initiatives (recently announced dairy stakeholder working group)
- Develop workforce training centers – Create a pipeline of skilled labor
- Invest in infrastructure to enhance system resiliency and “Connect California”

THANK YOU

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